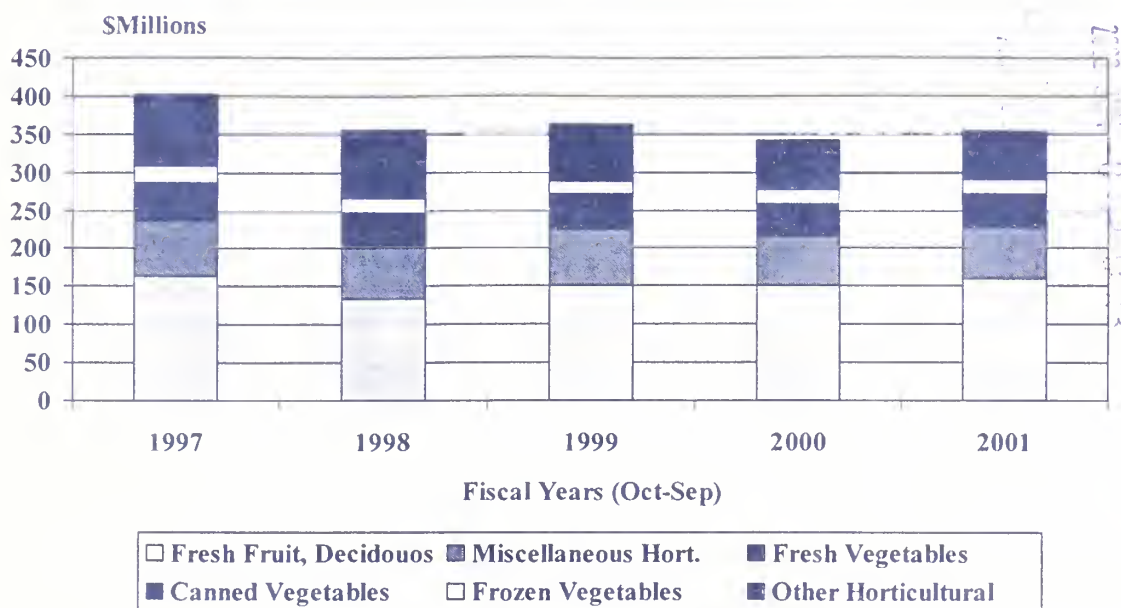


Historic, Archive Document

Do not assume content reflects current scientific knowledge, policies, or practices.

World Horticultural Trade and U.S. Export Opportunities

Fresh Deciduous Fruit Dominates U.S. Horticultural Exports to Taiwan



As an island, Taiwan is heavily dependent on imports and has been one of the largest markets for U.S. agricultural products since the 1970s. Taiwan is currently the sixth largest market for U.S. horticultural product exports. In fiscal year (FY) 2001, U.S. horticultural shipments to Taiwan were valued at \$355 million, 4 percent above exports in FY 2000. Fresh deciduous fruits, valued at nearly \$160 million, accounted for about 45 percent of total U.S. horticultural sales to Taiwan in FY 2001. The largest players in this category were apples (\$59 million), peaches and nectarines (\$51 million), table grapes (\$22 million), and cherries (\$14 million). Other major horticultural categories shipped to Taiwan in FY 2001 included miscellaneous products, which were valued at \$68 million, accounting for almost 20 percent of total U.S. shipments. The top products in the miscellaneous category were beer and potato chips, with \$18 million worth of exports each. Fresh, canned, and frozen vegetables are also important components of U.S. horticultural exports to Taiwan, totaling \$23 million, \$22 million, and \$19 million, respectively, in FY 2001. Other U.S. horticultural categories going to Taiwan are fresh citrus, tree nuts, juices, dried fruits, and essential oils.

[Check Out the New U.S. Trade Internet System Website. Go to
<http://www.fas.usda.gov/ustrade>]

For further information, contact:
U.S. Department of Agriculture - Foreign Agricultural Service
Horticultural and Tropical Products Division
1400 Independence Ave., S.W. Stop 1049
Washington, DC 20250-1049
Telephone: 202-720-6590
Fax: 202-720-3799
<http://www.fas.usda.gov/htp>

Frank Tarrant, Director
Scott Bleggi, Deputy Director for Marketing
Brian Grunenfelder, Deputy Director for Analysis

<u>ANALYSIS</u>		
Nancy Hirschhorn	202-720-2974	Situation & outlook supervisor, publication editor, export forecast coordinator, briefing paper coordinator, key development coordinator, tropical products
Erik Hansen	202-720-0875	Tree nuts, processed vegetables (excl. potatoes), EU trade policy, circular team & homepage coordinator
Bob Knapp	202-720-4620	Canned deciduous fruit, sugar
Edwin Lewis	202-720-5028	Kiwifruit, stone fruit, nursery products, avocados, NAFTA quarterly report, circular web team
Emanuel McNeil	202-720-2083	Fresh vegetables (excl. potatoes), cut flowers
Heather Page Velthuis	202-720-9792	Wine, brandy, table grapes, grape juice
Debra A. Pumphrey	202-720-8899	Fresh and processed citrus, coffee, trade questions on tea, cocoa, essential oils & spices, & information technology coordinator
Rey Santella	202-720-0897	Dried fruit, berries, beer/hops, melons, circular web team
Sam Rosa	202-720-6086	Fresh deciduous fruit, trade issues database coordinator, apple juice, olives, mushrooms
Martin Patterson	202-720-7304	Policy issues coordinator for subsidies & tariff issues, tariff rate quotas & licensing, trade agreements, multilateral policy issues, biotechnology issues, SPS/food safety/quality issues coordinator, bilateral technical & policy issues
<u>MARKETING</u>		
Steve Shnitzler	202-720-8495	Apricots, avocados, ginseng, pomegranates, Bartlett pears, kiwi
Ted Goldammer	202-720-8498	Potatoes (marketing & analysis), apples, hops, sweet cherries, QSP
Sonia Jimenez	202-720-0898	Citrus, winter pears, peaches, plums, nectarines, Section 108
Kristin Kezar	202-690-0556	Tart cherries, canned fruit, papaya, melons, raisins
Elizabeth Mello	202-720-9903	Vegetables, berries, Cochran/EMO programs, Produce Marketing Association (PMA), Chocolate Manufacturers Association
Ingrid Mohn	202-720-5330	Tree nuts, prunes (dried plums)
Elias Orozco	202-720-6791	Honey (analysis & marketing), website updates
Yvette Wedderburn Bomersheim	202-720-0911	Wine, brandy, grape juice, table grapes, Export credit programs

Table of Contents

PAGE

FEATURE ARTICLES:

Taiwan WTO Accession and U.S. Horticultural Trade	6
Canned Deciduous Fruit Situation (In Selected Countries).....	11

WORLD TRADE SITUATION AND POLICY UPDATES:

U.S. Requests WTO Dispute Settlement Panel to Review Japan's Import Restrictions on Apples	19
EU Formally Sends WTO Lists of Goods Targeted for Sanctions	19
The Department of Commerce Announces Final Determinations on Imports of Individually Quick Frozen (IQF) Red Raspberries from Chile Value.....	19
U.S. Almond Exports Continue Record Expansion.....	20

EXPORT NEWS AND OPPORTUNITIES:

GSM-102.....	21
Supplier Credit Guarantee Program.....	22
GSM-102 and SCGP	22

STATISTICS:

Taiwan's Fresh Vegetable and Fruit Imports from the U.S. and the Exchange Rate	7
Top 3 U.S. Fruit Exports to Taiwan.....	8
Other Key U.S. Fruit Exports to Taiwan	8
Horticultural Commodity Liberalization	9
Canned Peaches: Production, Supply and Distribution	15
Canned Pears: Production, Supply and Distribution.....	16
U.S. Imports of Canned Peaches.....	17
U.S. Exports of Canned Peaches.....	17
U.S. Exports of Canned Pears.....	18
U.S. Exports of Canned Fruit Mixtures	18
FY 2002 SCGP Coverage	23
FY 2002 GSM-102 Coverage	24
Top United States Horticultural Product Exports By Value	25
Top United States Horticultural Product Exports By Volume.....	25
Top United States Horticultural Product Imports By Value.....	26
Top United States Horticultural Product Imports By Volume.....	26
Selected Horticultural Crop Prices Received by U.S. Growers	27

Export Summary

March

U.S. exports of horticultural products to all countries in March totaled \$979 million, an increase of 2.6 percent from March 2001. The categories with significant increases in March were tree nuts (up 37 percent to \$89 million), fruit and vegetable juices (up 39 percent to \$90 million), fresh vegetables (up 13 percent to \$121 million), and essential oils (up 13 percent to \$72 million). The categories with the most significant decreases were fresh fruit (down 13 percent to \$180 million), processed fruit (down 10 percent to \$51 million), wine and beer (down 9 percent to \$54 million), and processed vegetables (down 7 percent to \$133 million).

March 2002 exports to Canada were up 9 percent from March 2001 to \$313 million, while exports to the EU rose 13 percent to \$187 million, sales to Japan fell 7 percent to \$157 million, and sales to Mexico fell 14 percent to \$67 million. Exports to India in March 2002 totaled \$6 million, a 71-percent increase from March 2001. Exports to Korea rose 13 percent from March 2001 to \$46 million, while exports to China rose 3 percent to \$14 million. However, exports to Hong Kong fell 11 percent to \$27 million, while exports to Taiwan fell 31 percent to \$18 million.

Exports for the fiscal year (FY) 2002 period were down less than 1 percent from the same period in FY 2001 to \$5.5 billion. Tree nut exports were up about 10 percent to \$733 million for the October-March 2001/02 period, while essential oils exports were up 12 percent to \$348 million, and fruit and vegetable juices rose less than 1 percent to \$670 million. All other categories declined. Exports to Canada rose 3 percent to \$1.3 billion for the October-March period, while exports to the EU rose less than 1 percent. Exports to Japan, Hong Kong, and Taiwan dropped 8 percent, 11 percent, and 23 percent, respectively compared with the same period in FY 2001. The fastest growing markets for FY 2002 to date are: India, up 47 percent, Korea, up 24 percent, and China, up 14 percent.

To access FAS Attaché Reports online, please reference the following Internet address:

<http://www.fas.usda.gov/scriptsw/attacherep/default.asp>

Search through the country and market reports prepared by FAS attaches covering over 20 horticultural and tropical product commodities and nearly 130 countries. Search by keyword, including country and commodity.

What's New on the Homepage?

The Horticultural & Tropical Products Division has introduced an enhanced feature on its homepage designed to bring the latest information to the public as efficiently as possible. The site will contain information on policy and technical developments affecting trade in horticultural commodities, as well as selected reports submitted by FAS overseas offices and special reports prepared by the division. The information will typically remain on the site for approximately one month, before being archived. For further information on this new feature, please contact Nancy Hirschhorn (202) 720-2974. Go to <http://www.fas.usda.gov/http/> and click on "What's New?"

Taiwan WTO Accession and U.S. Horticultural Trade

Taiwan's accession to the World Trade Organization on January 1, 2002 has allowed for improved access to a market that is very important to the U.S. horticultural industry. Despite an already large market share, the United States can expect this market to become increasingly competitive.

Country Overview

Taiwan is an island located between Japan and the Philippines, with a current population of 22,406,000 people. As an island, Taiwan is heavily dependent on imports. Traditional labor-intensive industries are steadily being moved offshore and replaced with more capital- and technology-intensive industries. Taiwan is continually developing its business relationships with the Chinese mainland and is a major investor in the People's Republic of China (PRC). In addition, Taiwan has become a major investor in Thailand, Indonesia, the Philippines, Malaysia, and Vietnam. Japan is a major supplier of goods and services to Taiwan, accounting for 24 percent of total imports during 2001. The United States ranked second, accounting for 17 percent, ahead of Korea and China. Because of its conservative financial approach and its entrepreneurial strengths, Taiwan was better able to absorb the negative affects from the Asian crisis of the late 1990s.

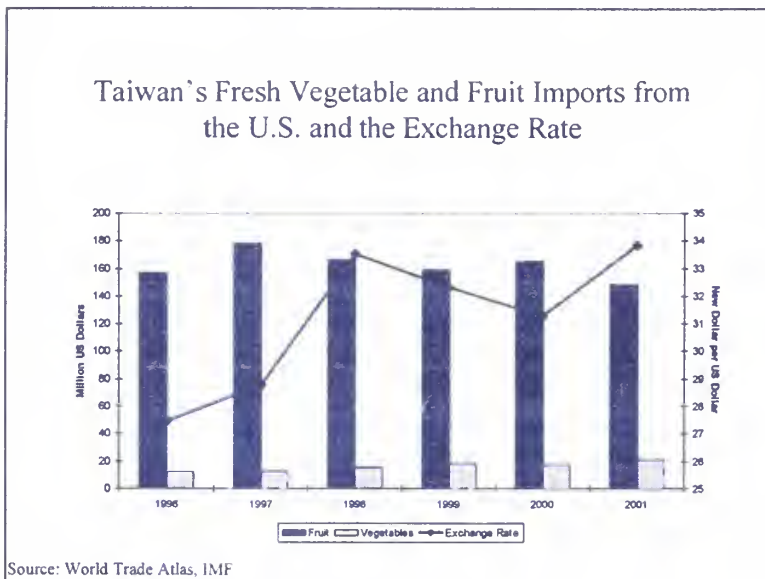
Taiwan has been one of the largest markets for U.S. agricultural products since the 1970s, importing grains, soybeans, and an increasing variety of higher valued products. The United States is Taiwan's main supplier of total agricultural products, with sales of approximately \$ 2.2 billion in 2001. During fiscal year 2001, Taiwan was the sixth largest market for U.S. horticultural export with exports valued at \$ 355 million. Australia, New Zealand, Thailand and Japan also contributed to the total \$ 4.7 billion in agricultural-related imports during 2001.

Trading Dynamic

Overall, Asia has about 60 percent of the world's population but only about 34.5 percent of the world's arable land. As a result, vegetable and fruit production practices in Asia are highly labor intensive on land that is relatively scarce. Despite this reality, the Asian diet is traditionally high in fruits and vegetables. As the Asian countries regain financial stability and grow economically, the demand for higher quality horticultural products is expected to increase. Agriculture in Taiwan now contributes only about 3 percent of GDP, down from 35 percent in 1952. Building on the well-established trade with Taiwan could become a "gateway" for expanding agricultural trade with the rest of the region.

The United States is by far the largest provider of total fresh fruit supplied to Taiwan. The value of the Taiwan dollar weakened during the Asian Crisis, but fared better than other Asian countries such as Indonesia and Thailand. The currency gained some strength in 1999/2000 but then saw another slight downward pitch against the U.S. dollar last year during Taiwan's first economic contraction since 1990. During 2001, unemployment reached 5 percent, while the

economic growth rate declined 2.2 percent, which, in part, led to a decline in fresh fruit exports to Taiwan. In contrast, fresh vegetables, although a much smaller portion of U.S. horticultural trade to this market, saw an 8 percent increase (\$2.5 million). During the first quarter of this year, and since WTO accession, horticultural product shipments to Taiwan from the United States have decreased 11 percent compared to the same period during 2001.



The mid-term outlook for trade with Taiwan appears promising, with the admission of Taiwan into the WTO¹. Currently, the United States is well positioned to maintain and perhaps grow market share, as horticultural trade has already been established in the country and competitors continue to work out various phytosanitary restrictions. However, in the long term, it is expected that U.S. products will continue to face growing competition from third country producers.

Specific Commodities

The top fruit commodities exported to Taiwan from the United States includes apples, peaches, fresh grapes, cherries, plums and oranges. According to the Taiwan Directorate General of Customs, during 2001, U.S. apple shipments to Taiwan accounted for 77 percent of the total market with the remaining market share being supplied mostly by Chile, New Zealand and Japan. Despite declines in exports of apples to Taiwan since the Asian crisis, U.S. apples have been able to maintain market share under the previous system of preferential treatment, under which the United States and Canada were the only countries to have unrestricted access. Upon accession, Taiwan granted unrestricted access to all WTO members. However, countries will have to satisfy Taiwan's stringent plant quarantine requirements in order to ship product. Japan actually lost market share, declining from 5.5 percent in 1996 to 2.7 percent in 2001, but this is expected to turn around with shipments of Fuji apples under the new liberalization. About 7 percent of the market is held by Chile, but with open markets, increased shipments from other Southern Hemisphere countries are expected. In another market segment, stone fruit, the United States has about 85 percent of the Taiwan import market, with 15 percent supplied in the U.S. off-season from Chile, Australia, and New Zealand. Specifically, peach imports from the United States were valued at \$ 14.6 million in 2001, double the value of product moving into the market six years ago².

¹ January 1, 2002 – under the nomenclature of Chinese Taipei – officially, the Separate Customs Territory of Taiwan, Penghu, Kinmen and Matsu

² China does not meet Taiwan's current quarantine requirements for peach imports.

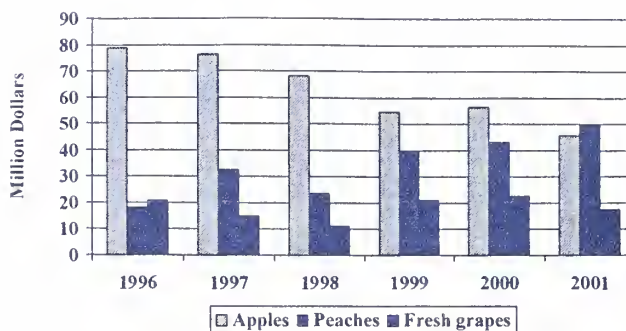
During 2001, U.S. market share of table grape imports into Taiwan was at 97 percent. The remaining 3 percent was supplied by Chile during the U.S. off-season. U.S. grapes compete mostly with local production, consisting of the Kyoho and Italia varieties and differing from those currently shipped by the United States.

Taiwan is also an important market for the cherry, plum, and orange industries in the United States. In terms of value of fruit exports, these commodities rank fourth, fifth, and sixth, respectively.

The U.S. leads the world in cherry exports, accounting for about 40 percent of the world total. Cherry exports to Taiwan were valued at about \$15 million last year. Asian markets, specifically Japan and Taiwan, helped to sustain export growth. The current applied tariff of cherries imported into Taiwan is 7.5 percent.

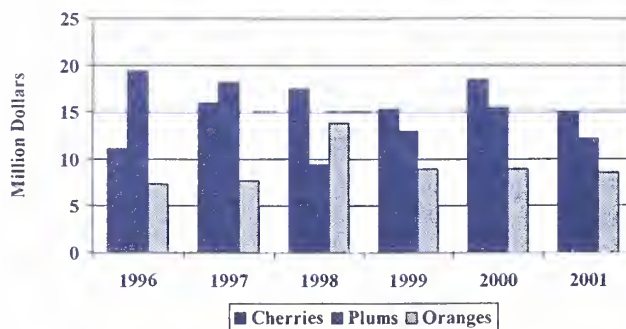
Top 3 U.S. Fruit Exports to Taiwan

By Commodity



Source: U.S. Department of Commerce, Bureau of the Census

Other Key U.S. Fruit Exports to Taiwan



Source: U.S. Department of Commerce, Bureau of the Census

With WTO accession, the number of countries supplying the market for plums will expand. Southern Hemisphere countries like Chile, Australia, and New Zealand as well as Europe, are expected to eventually ship to Taiwan. However, Chile and Australia are currently barred from shipping due to pest concerns.

During the off-season lasting from April to September 2001, the United States supplied about 93 percent of all oranges imported into Taiwan, valued at about \$8.5 million. South Africa also accounted for a nominal amount. At this time, a major concern for local growers is that Thailand

produces oranges during a season that is only slightly earlier than Taiwan's at much lower prices. Currently, however, Thailand and South Africa are identified as having pest problems and are restricted from exporting oranges.

WTO Accession Trade Liberalization

Horticultural Commodity Liberalization

<i>Commodity</i>	<i>Tariff Rate before Accession</i>	<i>Tariff Rate Post Accession</i>
Potatoes	25 %	20 %
Oranges	Mar - Sep 25 % Oct - Feb 50 %	Mar - Sep 20 % Oct - Feb 30 %
Lemons	Jan - Sep 25 % Oct - Dec 50 %	Jan - Sep 15 % Oct - Dec 30 %
Grapefruit	Jan - Sep 25% Oct - Dec 50%	Mar - Sep 15% Oct - Feb 30%
Grapes	42.5 %	20%
Peaches	50 %	20%
Plums	35 %	20%
Apples	50%	20 %
Papaya	50 %	35 % (25 % deferred to 2004)
Other Mandarins	50 %	30%
Other Citrus	50 %	42.5 %

Product Marketing

Convenience stores, supermarkets, and hypermarkets are growing rapidly throughout Taiwan, accounting for 57 percent (\$11 billion) of total food sales, according to the Ministry of Economic Affairs. Food retailing in Taiwan has entered a new era of strong competition, mergers, and greater concentration. However, 55 percent of fruit is still handled (sold) in wet markets. During 1999, Taiwan authorities implemented a program to upgrade and remodel traditional wet markets.

Even though the distribution system has improved, handling and merchandising is still complicated. Many produce importers in Taiwan play the role of importer, distributor, and wholesaler because they are required to make deliveries to individual stores. Convenience stores can either buy directly or buy from importers and manufacturers. However, the current tendency is to increase the volume of direct imports to avoid the higher cost of products purchased from importers and local manufacturers.

Heavily dependent on imports, the retail sector is always receptive to new and innovative food products. Because gift giving is a big tradition in Taiwan, fruit packaged as gifts could offer some strong growth potential. In addition, lunch boxes are gaining acceptance and are viewed as

a good way to introduce consumers to U.S. fresh fruits. The market for packaged vegetables and ready to eat foods is also growing.

U.S. suppliers are encouraged to provide products that suit the local taste and can be incorporated into locally known dishes. U.S. origin is well regarded in Taiwan and U.S. products in stores such as Costco are the most popular. The Agricultural Trade Office, Taipei, reports that strong U.S. brand image is necessary due to increasing competition.

The hotel and restaurant industries (HRIs) are benefiting from the growing number of meals consumed outside of the home. However, HRIs are so fragmented that their purchasing power is low, making it difficult for U.S. suppliers to gain advantage over competitors. In addition, people do not associate what they eat in restaurants with what they buy for home consumption. The total size of Taiwan's foodservice/HRI sector in 2000 was approximately \$9 billion. Bakeries are very prevalent in Taiwan and also innovative. Nuts, dried fruits, and fresh fruits are used in bakeries.

In Taiwan, the term "organic" is used liberally because there is not a certification organization. Small stores specialize in organics. The term "organic" typically means locally grown and not certified. Because "organic" is not clearly defined in the mind of the consumer and because of its overuse, the average consumer remains skeptical of products referencing this term.

Quality appears to be a greater influence on the Taiwanese consumer than price. Even when faced with financial difficulties, the average consumer will continue to choose a healthful diet that includes an abundance of fresh fruit and vegetables. Food appearance in general is very important and more specifically, fruit color, and size are of primary consideration. These factors greatly influence the price received for the good. Although trade liberalization will increase competition for the United States on the Taiwan market; tariff reductions are likely to lower import costs, which can be passed on to the consumer.

Canned Deciduous Fruit Situation (In Selected Countries)

Production of canned peaches in selected countries for 2001/02 is estimated at 1.12 million metric tons, down 3 percent from the revised estimate of 1.16 million tons produced in 2000/01. World exports for the selected countries 2001/02 are forecast at 654,000 tons, up less than one percent from the preceding year. Canned pear production for 2001/02 is forecast at 139,500 tons, up 13 percent from the previous year. Exports of canned pears for 2001/02 are estimated at 89,000 tons, up 2 percent from last year's level. Forecast Northern Hemisphere production of canned peaches for 2002/03 is placed at 900,600 tons, up 1 percent from this year's level. Exports are forecast at 493,000 tons, down 6 percent from this year's estimate of 522,000 tons.

Regional and Country Highlights

The canned deciduous fruit sector is suffering a market crisis throughout the world, due principally to an overproduction of canned peaches, low prices, and increased competition among the principal exporters: Greece, South Africa, Chile, and Australia.

Greece

Despite unfavorable weather during January 2002, the clingstone peach crop does not appear to be seriously reduced from last season's level. Canned peach output for the 2001/02 marketing year is now estimated at 407,000 tons, up nearly 11 percent from the November estimate and 10,000 tons over the 2000/01 level. In fact, last year's output is the second largest on record after the 441,000 tons produced in 1999/2000. The total supply available for export in the coming year is the third largest, exceeded only by the quantities on hand during the two previous marketing years. Exports last year set a new record, reaching 420,000 tons, up 30,000 tons over the previous record, set in 1995/96. Exports for 2002/03 are forecast to be 395,000 tons.

Last year withdrawals totaled 50,000 tons compared to 204,000 tons the year before. The quantity of peaches withdrawn from the market declined due to the EU's policy to phase out withdrawal payments by marketing year 2003/04. Last year the EU paid growers about 10.4 U.S. cents/kg for withdrawn fruit. The maximum quantity available for this payment equaled 20 percent of the total fruit marketed. This included both freestone and cling peaches, for fresh and processed markets. This coming marketing year, the EU will reduce this quantity to 10 percent of the total quantity marketed.

The price paid for withdrawn fruit equaled almost 48 percent of the price of peaches delivered to processors, (21.8 cents/kg). The support to growers is provided through producer organizations. This support is estimated to comprise about 20 percent of the price (21.8 cents/kg) received by growers. Thus, growers' income is a function of a weighted average price consisting of the

withdrawal price, market price and EU subsidy.

Under the EU's previous canned fruit regime, the growers' subsidy or guaranteed price was passed through the processors. The EU paid the processors a "processing aid," which theoretically was to be included in the price processors paid to the growers. However, there was always a general concern among global competitors that a portion of this aid was held back by processors and used to maintain inefficient operations, acting as an indirect export subsidy. As a result of the reform of the canned fruit regime, principally the payment of subsidies to producer organizations and the gradual elimination of the withdrawal aid, the number of processing plants declined to 15, compared to 22 in marketing year 2000/01 and to about 27 during the peak of the mid 1990's. However, this decline in the number of processing plants did not translate into a decline in the capacity of fruit processing, which has always exceeded the demand for fruit. Currently most of the fresh fruit is processed in plants operating at two-thirds of capacity. The Greek industry claims that processors prefer not to increase output in order to stabilize prices in international markets. However, prices in the international markets may rise, if the quantity of fresh fruit available to Greek processors declines in response to a total elimination of subsidies to growers.

Greek exports set a record 420,000 tons last year, due to an unprecedented supply of subsidized product and an appreciating U.S. dollar. However the appreciating dollar did not have a significant impact in Latin America, as evidenced by protective action taken by several Latin American countries, whose currency depreciated against the EURO. Fundamentally, Greek prices last year were extremely low, resulting in large exports and causing some import relief actions against Greek shipments. Argentina initiated a countervailing duty of 12 percent on top of a 35 percent tariff and a \$0.5/kg safeguard measure. Brazil initiated an anti-dumping duty of 100 percent on top of 16.5 percent tariff and an additional tariff of 55 percent for a special listing of the product on an exception list. The loss of these two markets contributed to expanded Greek shipments into the United States.

As Greece solidifies its dominance in the canned peach sector, Greek production of fruit mixtures is expected to increase. Peaches are the fundamental ingredient in a traditional fruit cocktail mixture. Excess production of fresh peaches accompanied by surplus processing capacity should, with proper management, provide a solid base for a larger output of canned fruit mixtures. Since 1997, Greek production of fruit mixtures has increased from 1,800 tons to over 28,000 tons in 2001. Production for 2002 is forecast at 32,000 tons.

Italy

Italian canned peach, pear, and mixed fruit output for 2001/02 are estimated at 21,000 tons, 46,000 tons and 73,000 tons, respectively. Forecast production for the upcoming 2002/03 year is unchanged from these figures.

The competitive price of Greek canned peaches on the international market forced Italy to rebuild its stocks. Due to large stocks, Italian canned peach imports are forecast to decline in 2002/03, whereas exports should remain stable.

Canned pear output for 2001/02 is estimated at 46,000 tons up, 12,000 tons from the previous forecast. The Italian canned mixture production has also been revised upward from 68,000 tons reported in November to 73,000 tons.

Italian exports of canned pears and mixtures increased in marketing year 2000/01, despite a decline in fruit mixture output. In fact, Italian canned pears and mixtures remain competitive on the international market, due to the quality of Italian pears and their relatively low prices.

From a marketing standpoint, canned peaches and pears are generally considered to be a mature food product, with little room for growth, due to competition from fresh fruit imports, which are increasingly available throughout the year. Fruit cocktail, however, is considered to be a convenience food that still offers market opportunities, especially in export markets. Canned pears and peaches are destined almost exclusively for the catering industry in Italy, while canned mixtures are still consumed by families.

South Africa

Estimated 2002 canned fruit production (peaches, pears, apricots, and mixed fruit) is placed at 168,000 tons, a decrease of 10 percent from a year earlier, due to lower fresh production. Exports, in particular to EU markets, are forecast to increase, due to strong demand at premium prices.

Despite lower output, exports of canned fruit in 2002 are expected to grow by 14 percent while domestic consumption will rise by 5 percent. Of the total fresh fruit expected to be delivered for processing, about 41,300 tons are apricots, 114,800 tons peaches, 57,442 tons pears, and 213,552 tons mixed fruit. Total canned fruit exports during 2001 decreased from the previous year to around 129,400 tons.

South Africa's fruit canning industry is the fourth largest in the world. The industry is made up of four main canners, Langerberg Foods, Sapco of Delmonte Brand, Ashton, and Rhodes Fruit Farm Foods. Exports account for 90 percent of all canned fruit production, 50 percent of which goes to Europe. According to the Canning Fruit Producers Association (CFPA), the canning fruit market is growing only slightly each year. Not all of South Africa's deliveries for processing are used for canning. Depending on the quality, fruits are also processed for juice, or pureed as pulp and baby food.

South Africa's canned fruit exports to Europe are still important, although sales to the Far East and the rest of the world are constantly rising as a result of South Africa's shift in marketing strategy from Europe to other regions. Under the SA/EU Trade Agreement, which became effective in January 2000, the South African canners have closely monitored their EU shipments to get the maximum possible benefit from their allocated tariff quota. There has also been close liaison with government departments and the South African Revenue Service (SARS) regarding the management of the quotas. The 2000 quotas were shared amongst the canners, based on their historical average share of exports to the EU during the period 1996 to 1998. Although this procedure complies with

the SA/EU Free Trade Agreement Protocol, it does not take into account shifts in individual canner export patterns.

The FAS Attaché Report search engine contains reports on the Canned Deciduous Fruit. For information on production and trade, contact Robert Knapp at 202-720-4620. For information on marketing contact Kristan Kezar at 202-609-0556.)

CANNED PEACHES: PRODUCTION, SUPPLY AND DISTRIBUTION

Country	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
--Metric Tons Net Weight 1/ --							
Greece							
2000/01	102,000	397,000	1,300	500,300	366,000	13,000	121,300
2001/02	121,300	407,000	1,000	529,300	420,000	13,300	96,000
2002/03	96,000	367,000	1,000	464,000	395,000	14,000	55,000
Italy							
2000/01	11,500	26,500	25,000	63,000	32,000	11,000	20,000
2001/02	20,000	21,000	20,000	61,000	33,000	10,000	18,000
2002/03	18,000	21,000	16,000	55,000	34,000	9,500	11,500
Spain							
2000/01	22,000	143,000	3,800	168,800	61,200	87,600	20,000
2001/02	20,000	137,500	2,700	160,200	59,000	88,200	13,000
2002/03	13,000	135,000	3,000	151,000	54,000	88,000	9,000
United States							
2000/01	57,359	350,888	47,859	456,106	14,171	401,110	40,825
2001/02	40,825	325,557	52,650	419,032	10,002	388,618	20,412
2002/03	20,421	377,629	50,000	448,050	10,000	397,216	40,834
Australia							
2000/01	9,300	44,820	445	54,565	9,436	35,529	9,600
2001/02	9,600	45,650	500	55,750	10,568	35,582	9,600
2002/03	NA	NA	NA	NA	NA	NA	NA
Chile							
2000/01	319	46,000	168	46,487	35,000	7,000	4,487
2001/02	4487	46,000	50	50,537	40,000	7,000	3,537
2002/03	NA	NA	NA	NA	NA	NA	NA
Argentina							
2000/01	1,605	70,520	499	72,624	2,268	70,000	356
2001/02	356	55,000	450	55,806	2,500	53,000	306
2002/03	NA	NA	NA	NA	NA	NA	NA
South Africa							
2000/01	45,200	85,800	250	131,250	74,000	12,200	45,050
2001/02	45,050	87,500	252	132,802	79,000	12,700	41,102
2002/03	NA	NA	NA	NA	NA	NA	NA
Total							
2000/01	249,283	1,164,528	79,321	1,493,132	594,075	637,439	261,618
2001/02	261,618	1,125,207	77,602	1,464,427	654,070	608,400	201,957
2002/03	NA	NA	NA	NA	NA	NA	NA

Note: For Calendar year reference, MY 1999/00 would become Cy 1999

1/ One metric ton equals 48,99 standard 45-lb. cases net of 24x2 1/2 cans

Source U.S. Agricultural Attache Reports

CANNED PEARS: PRODUCTION, SUPPLY AND DISTRIBUTION

Country	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
--Metric Tons Net Weight 1/ --							
Australia							
2000/01	5,200	44,405	47	49,652	14,019	29,800	5,833
2001/02	5,833	44,820	50	50,703	14,000	30,100	6,603
2002/03	NA	NA	NA	NA	NA	NA	NA
Spain							
2000/01	900	28,500	400	29,800	13,100	13,700	3,000
2001/02	3,000	26,000	350	29,350	14,000	12,750	2,600
2002/03	2,600	26,000	500	29,100	13,000	13,500	2,600
Italy							
2000/01	16,000	30,000	2000	48,000	39,000	9,000	0
2001/02	0	46,000	2000	48,000	40,000	8,000	0
2002/03	0	46,000	2000	48,000	41,000	7,000	0
South Africa							
2000/01	8,328	20,820	0	29,148	20,800	2,250	6,098
2001/02	6,098	22,700	0	28,798	21,000	2,270	5,528
2002/03	NA	NA	NA	NA	NA	NA	NA
Total							
2000/01	30,428	123,725	2,447	156,600	86,919	54,750	14,931
2001/02	14,931	139,520	2,400	156,851	89,000	53,120	14,731
2002/03	NA	NA	NA	NA	NA	NA	NA

Note: For Calendar year reference, MY 1999/00 would become CY 1999

1/ One metric ton equals 48,99 standard 45-lb. cases net of 24x2 1/2 cans

Source U.S. Agricultural Attache Reports

U.S. IMPORTS OF CANNED PEACHES
Marketing Year June/May

Origin	1996/97	1997/98	1998/99	1999/2000	2000/01	2000/01 June - Feb	2001/02 June - Feb
--Metric Tons Net Weight 1/ --							
Greece	19,475	4,586	6,715	20,077	35,437	31,901	26,036
Spain	4,324	11,424	1,971	1,993	3,122	2,409	7,810
South Africa	2,717	3,863	1,531	474	4,390	1,870	4,756
Chile	1,166	447	69	2,388	1,654	767	653
China	244	728	1,064	369	881	647	2,228
Japan	69	7	0	0	0	0	0
France	56	102	46	95	133	80	77
Italy	19	13	25	0	59	59	20
Other	17	814	2,487	833	2,183	549	2,730
Grand Total	28,087	21,984	13,908	26,229	47,859	38,282	44,310

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans

Source: U.S. Census Bureau

U.S. EXPORTS OF CANNED PEACHES
Marketing Year June/May

Destination	1996/97	1997/98	1998/99	1999/2000	2000/01	2000/01 June - Feb	2001/02 June - Feb
--Metric Tons Net Weight 1/ --							
Canada	4,192	7,452	6,248	8,043	5,979	4,500	3,604
Mexico	451	950	4,154	5,395	220	162	289
Japan	2,559	2,917	2,475	2,248	1,083	938	187
Korea	1,593	569	1,220	1,142	1,541	1,107	496
Taiwan	1,295	912	1,036	346	392	355	31
Singapore	900	228	110	141	63	60	19
Hong Kong	809	287	197	47	56	50	0
Philippines	442	119	650	91	828	796	496
Costa Rica	494	581	619	450	343	285	248
Germany	233	346	265	101	0	0	0
Guatemala	217	188	226	383	216	170	83
El Salvador	214	218	245	273	243	189	71
Saudi Arabia	201	467	151	154	221	181	110
Russia	1,077	579	5	0	0	0	0
Other	1,329	3,184	10,133	1,383	2,986	2,519	770
Grand Total	16,006	18,997	27,734	20,197	14,171	11,312	6,404

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans

Source: U.S. Census Bureau

U.S. EXPORTS OF CANNED PEARS
Marketing Year June/May

Destination	1996/97	1997/98	1998/99	1999/2000	2000/01	2000/01 June-Feb	2001/02 June - Feb
--Metric Tons Net Weight 1/ --							
Canada	2,703	3,261	3,293	3,501	2,917	2,154	1,659
Mexico	77	14	0	23	0	0	103
Germany	115	95	96	0	0	0	0
United Kingdom	85	219	0	0	20	20	137
Japan	311	290	528	279	410	403	133
Hong Kong	49	6	128	87	0	0	120
Singapore	41	10	3	2	94	94	0
Thailand	39	22	17	8	1,260	1190	1038
Malaysia	31	19	18	6	0	0	3
Russia	43	0	0	0	108	108	26
Saudi Arabia	15	58	29	3	0	0	3
United Arab Emirate:	0	390	662	426	0	0	0
Other	197	323	214	254	1,032	888	1,124
Grand Total	3,706	4,707	4,988	4,589	5,841	4,857	4,346

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans
Source: U.S. Census Bureau

U.S. EXPORTS OF CANNED FRUIT MIXTURES
Marketing Year June/May

Destination	1996/97	1997/98	1998/99	1999/2000	2000/01	2000/01 June-Feb	2001/02 June - Feb
--Metric Tons Net Weight 1/ --							
Canada	7,422	8,512	10,432	10,273	4,653	3,873	2,375
Mexico	185	520	362	374	876	645	528
Japan	3,555	2,928	3,681	3,876	2,081	1,645	1,119
Philippines	3,804	700	633	640	628	563	349
Hong Kong	1,970	606	506	414	212	172	75
Singapore	1,826	999	817	567	455	391	314
Taiwan	416	626	814	355	104	50	0
Korea	421	689	500	547	158	158	75
Panama	597	1,148	802	844	593	466	277
El Salvador	337	379	486	447	479	105	58
Costa Rica	834	1,230	1,063	868	763	609	456
Saudi Arabia	820	1,182	1,022	186	659	326	320
Other	2,762	2,841	4,207	3,109	1,756	1,717	1,188
Grand Total	24,949	22,360	25,325	22,500	13,417	10,720	7,134

1/ One metric ton equals 48.99 cases standard cases of 24 x 2 1/2 cans
Source: U.S. Census Bureau

World Trade Situation and Policy Updates

U.S. Requests WTO Dispute Settlement Panel to Review Japan's Import Restrictions on Apples

On May 7, the United States formally requested the WTO's Dispute Settlement Body to establish a panel to consider Japan's fire blight import restrictions on U.S. apples. The U.S. request follows a round of bilateral WTO consultations, which took place in Geneva on April 18. The April 18 consultations failed to reach an agreement, with Japan insisting on maintaining intact its fire blight import restrictions. Now, as part of the WTO dispute settlement process, the United States has requested the formation of a panel to review evidence and, ultimately, issue a final report on the consistency of Japan's restrictions with its WTO obligations. The United States has been seeking since 1994 modifications to the U.S./Japan apple export program relative to fire blight. Joint U.S./Japanese scientific research has demonstrated that mature, symptomless apples are not carriers of fire blight. Still, the Japanese insist on a restrictive and costly work plan for fire blight that is effectively hampering U.S. apple sales to Japan. In marketing year (MY) 2000/01, U.S. apple to Japan totaled just 790 tons, valued at \$740,000. These figures contrast with the 10,450 tons, valued at nearly \$11 million, which were sold to Japan when the market first opened in MY 1994/95.

EU Formally Sends WTO Lists of Goods Targeted for Sanctions

On May 14, 2002, the EU formally sent to the WTO lists of goods it might target with sanctions in possible retaliation for U.S. duties on steel. This step was necessary in order for the EU to have the option to impose the sanctions at a later date. The EU has stated that the sanctions could come as early as June 18, 2002, if the United States does not offer compensation for the steel duties. There are two lists. The first list could be applied from June 18 and includes dried onions, apples, and orange juices. The duties would be 100 percent on this first list. The second longer list will apply if the WTO rules against the United States on the steel duties and if the United States does not halt the tariffs on steel. In addition to the first list, the second list includes many additional horticultural products; frozen sweet corn, other dried vegetables, kidney beans, lentils, shelled walnuts, guavas, mangoes and mangosteens, grapefruit, grapes, pears and quinces, cherries, prepared sweet corn, and grapefruit juice. For the horticultural products on the second list the additional duties range from 13-15 percent. According to the documents that the EU submitted, all of the commodities on the first list could collect an additional \$601.9 million in revenue. The second list could generate an additional \$585.5 million. The United States exported \$2.0 billion of horticultural products to the EU in calendar year 2001.

The Department of Commerce Announces Final Determinations on Imports of Individually Quick Frozen (IQF) Red Raspberries from Chile Value

On May 21, 2002, the Department of Commerce (DOC) announced its final determinations in the antidumping duty investigations of individually quick frozen (IQF) red raspberries from Chile. It was found that IQF red raspberries from Chile were being sold in the United States at less than fair market value. As a result, the DOC set antidumping duties ranging from 0.50 to

5.98 percent. The International Trade Commission (ITC) has 45 days to concur or disagree with DOC's findings. If the ITC determines that imports are materially injuring, or threaten material injury to the U.S. industry, then the DOC will issue an antidumping duty order. If the ITC renders a negative ruling then proceedings will be terminated and all securities posted will be refunded or canceled. In 2001, total U.S. imports of frozen raspberries were valued at \$11 million, of which more than \$6 million originated from Chile. In a separate ruling the Department of Commerce made a final determination that countervailable subsidies are not being provided to producers and exporters of IQF red raspberries from Chile.

On May 23, 2002, the U.S. International Trade Commission (ITC) will hold a hearing on the final phase of the countervailing duty and antidumping investigations.

U.S. Almond Exports Continue Record Expansion

U.S. almond exports (shelled basis) in marketing year 2001/02 (August-July) are forecast to increase 10 percent to a record 263,802 metric tons. This will break last year's record of 239,802 metric tons, which was worth an estimated \$691 million. Favorable weather and increased acreage set the stage for a potential record crop of California almonds. Crop forecasters said that the almond crop is expected to reach 426,384 tons in 2001/02. That would be up 40 percent from last year and beat the previous record crop of 1999/00. The United States is the world's largest almond producer and the largest exporter, accounting for approximately 80 percent of world production and 75 percent of world exports. Almonds are the United States' leading tree nut export. Principal markets for U.S. almonds include the EU (mostly Germany, Spain and the Netherlands), Asia (mostly India, Japan and China), Canada, and the United Arab Emirates. Steady growth in demand for U.S. almonds is the trend in European markets, while much stronger growth characterizes Asian and Middle Eastern markets.

Export News and Opportunities

Every U.S. exporter wants to get paid. However, credit can make or break a deal. It can shift the advantage to you or to your competitor. That's why many exporters turn to the U.S. Department of Agriculture's (USDA) Export Credit Guarantee Programs. With USDA's guarantee behind the credit, you can arrange competitive financing with less risk. Your buyers may benefit too, from longer terms and lower rates. In FY 2002, USDA has made available over \$5 billion in credit guarantees to facilitate sales to selected developing countries, Western Europe, Japan, Hong Kong, and Taiwan. Invest the time to learn more about the Export Credit Guarantee Programs, (GSM-102) and Supplier Credit Guarantee Program (SCGP), to increase your sales and lower your risks. Use GSM and SCGP to avoid possible importer and foreign bank defaults on payments and ensure that American farm and food products continue to move to markets around the world. While USDA does not provide financing, it guarantees payments due to U.S. exporters in case the foreign banks' or importers' default.

You may learn more about GSM-102 and SCGP regulations, country specific press releases and program announcements, and a Monthly Summary of Export Credit Guarantee Program Activity on the Internet at:

<http://www.fas.usda.gov/export.html>

GSM-102

On April 8, USDA increased the Algeria GSM-102 program allocation from \$50 million to \$150 million. All other terms and conditions as previously announced remain the same. The FAS announcements pertinent to this allocation are PR 0380-01 and PR 0413-01.

Also on April 8, USDA amended the GSM-102 program for Mexico for fiscal year 2002. The amendment changes the repayment terms from 6 months to 1 year, with maximum credit terms up to 3 years for applications received for guarantee coverage on or after the date of this announcement. The total FY 2002 allocation for coverage to Mexico under the GSM-102 program remains unchanged at \$1.0 billion, of which \$500 million is allocated and \$500 million is unallocated.

Exporters may apply for credit guarantees on a first-come, first-served basis to cover sales of eligible commodities to the aforementioned markets.

The GSM-102 program makes available credit guarantees for sales of U.S. agricultural commodities overseas. USDA does not provide financing, but guarantees payments due from foreign banks. USDA typically guarantees 98 percent of the principal and a portion of the interest. The GSM-102 program covers credit terms from 90 days to 3 years.

Under the program, once a firm sale exists, the qualified U.S. exporter applies for a payment guarantee before the date of export. The U.S. exporter pays a fee calculated on the dollar amount guaranteed, based on a schedule of rates applicable to different lengths of credit periods. The

CCC-approved foreign bank issues a dollar-denominated, irrevocable letter of credit in favor of the U.S. exporter, ordinarily advised or confirmed by the financial institution in the United States agreeing to extend credit to the foreign bank. The U.S. exporter may negotiate an arrangement to be paid as exports occur by assigning the U.S. financial institution the right to proceeds that may become payable under the guarantee, and later presenting required documents to that financial institution. Such documents normally include a copy of the export report. If a foreign bank fails to make any payment as agreed, the exporter or the assignee may file a claim with USDA for the amount due and covered by the guarantee. USDA will pay the U.S. bank and will take on the responsibility of collecting the overdue amount from the foreign bank.

Supplier Credit Guarantee Program

The SCGP is unique because it covers short-term financing extended directly by U.S. exporters to foreign buyers and requires that the importers sign a promissory note in case of default on the CCC-backed payment guarantee. The SCGP emphasizes high-value and value-added products, but may include commodities or products that also have been programmed under the GSM-102 program.

The SCGP encourages exports to buyers in countries where credit is necessary to maintain or increase U.S. sales but where financing may not be available without CCC guarantees. Under the SCGP, CCC guarantees a portion of payments due from importers under short-term financing (up to 180 days) that exporters have extended directly to the importers for the purchase of U.S. agricultural commodities and products. These direct credits must be secured by promissory notes signed by the importers. CCC does not provide financing but guarantees payment due from the importer.

GSM-102 and SCGP

The following tables present the FY 2002 GSM-102 and SCCP for which USDA has allocated credit guarantees for sales of U.S. horticultural products. The table also includes horticultural sales (exporter applications received) that have been registered under GSM-102 and SCGP. For most countries and regions, exporters may apply for credit guarantees on a first-come-first-served basis to cover sales of any of the eligible commodities published in FAS program announcement PR 0096-01, issued March 20, 2001 or as superseded. The following horticultural products are eligible under the export credit guarantee programs: dried fruit; fresh fruit; frozen fruit; canned fruit; 100-percent fruit juices; fruit and vegetable concentrates, pastes, pulps and purees; honey; hops or hops extract; beer; tree nuts; fresh vegetables; canned vegetables; dried vegetables; wine; and brandy. The General Sales Manager will consider requests to establish an SCGP and/or GSM Program for a country or region or amend an authorized program to include horticultural commodities and products that are currently not eligible.

(For further information on the SCGP or GSM-102 Program for horticultural commodities, contact Yvette Wedderburn Bomersheim on 202-720-0911 or Rochelle Foster on 202-720-2936).

FY 2002 SCGP COVERAGE

Country	Commodity	Announced Allocations	Exporter Applications Received	Balance
		--coverage in millions of dollars--		
Algeria		10.00	0.00	10.00
Azerbaijan		5.00	0.00	5.00
Baltic Region		20.00	0.64	19.36
Caribbean Region		10.00	1.55	8.45
	Wine (180)		0.02	
Central America Region		50.00	23.93	26.07
	Fruit, Fresh (180)		0.20	
Central Europe Region		20.00	0.00	20.00
China/Hong Kong Region		50.00	0.10	49.90
	Wine (180)		0.01	
Egypt		20.00	8.60	11.40
India		25.00	0.00	25.00
Israel		20.00	0.04	19.96
Japan		50.00	0.00	50.00
Kazakhstan		15.00	2.00	13.00
Kenya		2.00	0.00	2.00
Korea		50.00	8.44	41.56
	Fruit, Canned (180)		0.19	
	Fruit, Fresh (180)		8.20	
	Wine (180)		0.05	
Mexico		200.00	135.74	64.26
	Fruit, Fresh (180)		0.03	
	Wine (180)		0.04	
Pakistan		10.00	0.00	10.00
Poland		10.00	0.05	9.95
Russia		20.00	1.81	18.19
	Fruit, Fresh (180)		0.01	
South Africa		10.00	0.00	10.00
South America Region		20.00	1.33	18.67
Southeast Asia Region		150.00	54.98	95.02
	Fruit, Fresh (180)		0.20	
	Fruit Juice (180)		0.01	
	Fruit Juice Concentrates (180)		0.01	
	Wine (180)		0.02	
Southeast Balkans Region		75.00	0.57	74.43
Southeast Europe Region		20.00	0.00	20.00
Sri Lanka		10.00	0.00	10.00
Taiwan		50.00	0.01	49.99
	Wine (180)		0.01	
Turkey		10.00	0.80	9.20
West Africa Region		35.00	5.91	29.09
Western Europe Region		50.00	1.01	48.99
	Wine (180)		0.12	
Yemen		10.00	0.00	10.00

FY 2002 GSM-102 COVERAGE

Country	Announced Allocations --coverage in millions of dollars--
Algeria	150.00
Azerbaijan	5.00
Baltic Region	15.00
Bulgaria	7.00
Caribbean Region	220.00
Central America Region	250.00
Central Europe Region	10.00
China/Hong Kong Region	300.00
Dominican Republic	25.00
East Africa	5.00
Egypt	100.00
India	25.00
Jordan	40.00
Kazakhstan	10.00
Korea	850.00
Lebanon	10.00
Malaysia	30.00
Mexico	500.00
Morocco	10.00
Nigeria	10.00
Philippines	100.00
Poland	25.00
Romania	25.00
Russia	20.00
South America Region	600.00
Southeast Asia Region	190.00
Southeast Europe Region	25.00
Southern Africa Region	50.00
Sri Lanka	35.00
Thailand	100.00
Tunisia	30.00
Turkey	345.00
West Africa Region	14.00

Top United States Horticultural Product Exports By Value
Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Mar.	Oct. - Mar.
						FY 2001	FY 2002
--- 1,000 Dollars ---							
Almonds	879,032	772,891	696,818	580,815	682,680	379,179	424,346
Essential Oils	622,219	532,623	507,651	591,583	674,715	310,831	348,150
Wine & Wine Prdts	390,376	510,923	545,287	538,143	548,601	258,567	238,792
Fresh Apples	412,855	328,068	375,869	336,444	414,227	255,503	220,227
Fresh Grapes	313,836	274,953	283,865	332,162	390,322	199,635	197,061
Frz. Potato Fries	294,417	313,209	343,216	339,553	359,945	182,007	169,461
Oranges	308,055	339,114	159,585	268,808	304,406	177,209	163,726
Orange Juice All	305,172	295,564	307,165	290,395	251,043	129,135	136,059
Proc. Tomatoes	229,526	233,209	220,380	221,306	227,506	115,551	115,888
Nursery Products	185,316	220,055	229,737	216,722	215,261	124,633	111,036
Fresh Lettuce	146,640	173,746	157,262	180,099	201,531	107,417	124,116
Grapefruit	240,408	189,744	221,443	208,329	200,273	153,350	151,621
Beer	341,784	280,088	211,861	177,241	199,782	83,668	73,916
Potato Chips	145,468	226,987	257,355	243,824	182,895	104,973	85,088
Walnuts	195,209	153,863	154,449	149,315	175,541	126,852	135,659
Fresh Cherries	140,650	113,556	154,793	169,516	159,885	1,947	1,400
Prunes	138,398	133,732	133,885	131,697	151,664	81,742	73,697
Fresh Tomatoes	123,789	122,345	127,153	148,312	150,990	75,021	68,416
Raisins	204,388	199,733	198,817	145,861	150,869	77,228	73,457
Proc. Sweet Corn	167,490	139,068	148,050	146,591	120,893	66,486	66,262
Total Other	4,838,913	4,765,679	4,864,543	5,121,136	5,296,828	2,547,572	2,577,070
GRAND TOTAL	10,623,941	10,319,150	10,299,184	10,537,852	11,059,857	5,558,506	5,555,448

Top United States Horticultural Product Exports By Volume
Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Mar.	Oct. - Mar.
						FY 2001	FY 2002
Fresh Apples	690,595	539,685	664,969	571,860	742,377	467,017	376,003
Oranges	569,739	609,433	247,419	490,867	541,338	321,083	261,300
Frz. Potato Fries	396,738	438,425	468,826	469,287	505,641	257,576	240,752
Orange Juice All	565,332	553,175	554,951	550,888	464,112	240,345	331,915
Grapefruit	484,417	387,216	428,784	390,958	390,498	302,299	298,668
Fresh Onions	265,859	292,328	257,089	333,775	357,427	230,291	184,671
Fresh Lettuce	294,571	303,816	312,563	328,600	350,247	184,873	200,821
Wine & Wine Prdts	208,786	266,294	274,696	281,475	311,924	147,730	129,835
Fresh Grapes	236,400	214,569	221,158	272,901	303,583	151,231	145,805
Beer	536,362	425,523	330,158	278,522	300,673	123,343	108,955
Proc. Tomatoes	293,112	300,327	264,369	277,277	297,129	150,822	150,237
Almonds	187,953	202,968	200,847	220,099	258,543	137,221	175,144
Fresh Melons	219,695	211,310	247,448	250,860	234,887	45,116	39,542
Fresh Tomatoes	153,657	133,687	148,271	181,892	173,470	73,780	78,666
Pears	126,603	156,807	145,816	162,629	158,199	104,100	116,105
Fresh Broccoli	130,999	126,791	154,514	182,848	157,465	68,555	65,260
Proc. Sweet Corn	203,613	171,294	186,153	187,818	150,891	84,760	75,966
Peaches	103,442	80,023	97,974	113,098	129,221	12,577	15,274
Lemons	120,330	113,392	113,931	106,249	110,507	64,447	61,073
Raisins	115,215	120,741	104,225	83,832	109,877	54,631	54,862

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

Source: U.S. Department of Commerce, Bureau of the Census.

Top United States Horticultural Product Imports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

						Oct. - Mar.	Oct. - Mar.
Commodity 1/	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	FY 2001	FY 2002
--- 1,000 Dollars ---							
Beer	1,443,326	1,677,002	1,865,038	2,126,018	2,296,135	1,019,980	1,117,748
Wine & Wine Prdts	1,629,254	1,829,709	2,150,057	2,271,185	2,283,829	1,142,242	1,216,823
Bananas & Plantns	1,194,458	1,188,442	1,180,227	1,098,409	1,125,986	537,310	566,365
Nursery Products	565,267	632,672	673,194	745,977	789,101	394,004	407,888
Fresh Tomatoes	611,612	735,180	713,121	608,428	755,045	436,749	281,478
Fresh Grapes	386,183	440,659	545,409	518,260	581,556	332,047	392,062
Cut Flowers	572,926	630,067	578,766	623,213	577,418	315,471	291,318
Fresh Peppers	251,908	343,606	324,880	451,848	507,988	260,701	229,314
Cashews	292,315	339,490	390,111	487,687	366,689	188,765	177,492
Frz. Potato Fries	156,831	216,576	252,437	321,914	338,228	163,757	191,662
Essential Oils	322,447	350,086	315,861	309,570	300,590	152,781	162,257
Fresh Melons	226,502	250,921	277,880	259,797	285,704	174,307	160,724
All Apple Juices	354,632	228,735	210,263	278,975	230,406	108,172	116,945
Olives	184,217	181,730	200,293	184,928	204,810	98,679	99,907
Fresh Cucumbers	100,823	154,634	138,241	168,771	200,549	109,367	108,099
All Orange Juices	240,072	211,353	285,947	243,298	185,093	98,132	67,536
Fresh Onions	127,447	151,990	135,574	131,705	168,116	103,029	89,834
Fresh Mangos	123,009	125,047	138,823	142,010	152,116	42,144	58,746
Fresh Pineapple	74,441	83,676	121,679	117,539	151,753	72,118	76,018
Total Other	4,222,577	4,604,941	5,368,446	5,315,151	5,524,521	2,916,801	3,243,924
GRAND TOTAL	13,080,247	14,376,516	15,866,247	16,404,683	17,025,633	8,666,556	9,056,140

1/ Nursery Products excludes cut flowers.

United States Top Horticultural Product Imports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/ 2/	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001	Oct. - Mar.	Oct. - Mar.
						FY 2001	FY 2002
Beer	1,612,379	1,869,577	2,072,394	2,290,532	2,490,735	1,100,507	1,197,617
Wine & Wine Prdts	432,192	428,664	420,152	481,164	510,730	244,106	278,362
Bananas & Plantns	3,911,294	4,135,832	4,369,283	4,350,838	4,046,727	2,006,759	2,008,233
Nursery Products	2,206,085	2,460,306	2,765,772	2,860,569	2,926,298	1,481,377	1,501,681
Fresh Tomatoes	743,205	856,852	722,591	708,690	868,118	516,749	312,044
Fresh Grapes	857	1,039	978	1,185	1,061	704	804
Cut Flowers	2,770,092	2,770,186	2,707,948	2,804,568	2,642,134	1,375,749	1,334,874
Fresh Peppers	284,221	319,671	345,444	352,169	346,518	189,401	228,597
Frz. Potato Fries	269,794	353,931	397,455	470,605	519,751	248,206	309,312
Fresh Melons	779,005	860,437	873,032	898,995	878,214	534,117	543,527
All Apple Juices	1,084,986	1,016,823	1,140,355	1,171,502	1,230,760	521,463	660,663
Fresh Cucumbers	302,306	327,745	336,045	346,863	373,596	245,242	248,830
All Orange Juices	1,116,798	1,063,239	1,326,231	1,284,749	976,227	529,537	350,329
Fresh Onions	261,088	259,188	246,532	224,080	269,156	154,421	154,814
Fresh Mangos	191,115	188,767	212,992	231,078	229,492	55,416	79,692
Fresh Pineapple	171,253	255,533	272,601	304,207	333,476	165,984	158,512
Fresh Squash	141,192	157,537	151,916	156,520	168,099	127,871	127,211
Frozen Broccoli	169,458	153,962	186,187	164,090	168,988	102,248	107,882
Fresh Apples	168,564	156,700	158,550	170,490	156,593	33,253	41,422

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kilograms.

2/ Nursery Products excludes cut flowers.

Source: U.S. Department of Commerce, Bureau of the Census.

Selected Horticultural Crop Prices Received By U.S. Growers

Commodity	Domestic units	2001	2002		% Change	% Change
		April	March	April \1	Last Month	Last Year
		Dollars/unit				
Grapefruit 2/	Box	1.41	1.23	1.02	-17.1%	-27.7%
Lemons 2/	Box	3.65	5.74	5.19	-9.6%	42.2%
Limes 2/	Box	0	0	0	n/a	n/a
Oranges 2/	Box	4.71	4.88	4.3	-11.9%	-8.7%
Tangelos 2/	Box	0	0	0	n/a	n/a
Tangerines 2/	Box	9	8.19	13.17	60.8%	46.3%
Temples 2/	Box	0	1.25	0	-100.0%	n/a
Apples, fresh 3/	Lb.	0.157	0.21	0.215	2.4%	36.9%
Grapes	Lb.	0	0	0	n/a	n/a
Peaches	Ton	0	0	0	n/a	n/a
Pears, fresh 3/	Ton	337	267	267	0.0%	-20.8%
Strawberries, fresh	Lb.	0.757	0.873	0.267	-69.4%	-64.7%
Asparagus 4/	Cwt.	146	119	88.4	-25.7%	-39.5%
Broccoli 4/	Cwt.	26.9	33.8	22.7	-32.8%	-15.6%
Cantaloupes	Cwt.	0	0	0	n/a	n/a
Carrots 4/	Cwt.	17.3	21.1	21.2	0.5%	22.5%
Cauliflower 4/	Cwt.	46.5	44.1	19.9	-54.9%	-57.2%
Celery 4/	Cwt.	19.1	23.5	21.9	-6.8%	14.7%
Sweet Corn 4/	Cwt.	18.1	26.3	14.9	-43.3%	-17.7%
Cucumbers 4/	Cwt.	31	22.9	23.9	n/a	-22.9%
Lettuce 4/	Cwt.	21.6	86.4	19.3	-77.7%	-10.6%
Onions 4/	Cwt.	12.8	6.92	16	131.2%	25.0%
Snap Beans 4/	Cwt.	57.8	42.1	38.7	-8.1%	-33.0%
Tomatoes 4/	Cwt.	19	38.5	30.2	-21.6%	58.9%

1/ Preliminary

2/ Equivalent on-tree returns.

3/ Equivalent packinghouse-door returns for CA and NY (apples only), OR (pears only), and WA (apples, peaches, and pears). Prices as sold for other states.

4/ Fresh-market, FOB shipping point.

Weight per box of citrus.

Grapefruit : AZ, CA = 67 Lbs., Florida = 85 Lbs., and Texas = 80 Lbs. per box.

Lemons: AZ, CA = 76 Lbs. per box.

Limes: Florida = 88 Lbs. per box.

Oranges: AZ, CA = 75 Lbs., Florida = 90 Lbs., and Texas = 85 Lbs. per box.

Tangelos and Temples: Florida 90 Lbs. per box.

Note: Zeroes indicate insufficient information or insufficient sales to establish a price.

Source: National Agricultural Statistics Service (NASS), USDA.

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
1400 INDEPENDENCE AVENUE, SW
WASHINGTON, DC 20250-1004

For questions concerning your subscription or change of address,
PRINT OR TYPE the new address, including ZIP code and return this
sheet to:

U.S. DEPARTMENT OF COMMERCE
TECHNOLOGY ADMINISTRATION
NATIONAL TECHNICAL INFORMATION SERVICE
SPRINGFIELD, VA 22161

For questions or concerns on the data included in this publication,
contact us at the address shown above.



Summaries and selected tables from many Foreign Agricultural Service world market and trade reports are available electronically. The reports include U.S. Export Sales (available electronically after 8:30 a.m. on release day); Grain: World Markets and Trade; Oilseeds: World Markets and Trade; Cotton: World Markets and Trade; Tobacco: World Markets and Trade; World Agricultural Production; the early release version of World Horticultural Products and U.S. Export Opportunities; and Tropical Products: World Markets and Trade (all available electronically after 3:00 p.m. Washington DC time on release day) as well as Sugar: World

Markets and Trade; Livestock and Poultry: World Markets and Trade; Dairy: World Markets and Trade, and U.S. Planting Seed Trade (available within a week after release.)

You can read the reports on the FAS home page (<http://www.fas.usda.gov>). The reports remain "current" until the succeeding issue is available. Older issues are available in the archives section of the home page. We also make selected cover articles and graphics available from these publications, in a separate section of the site. Reports are also available from the Economic Bulletin Board at Stat-USA, on the same schedule. For more information, you may contact Stat-USA at (202) 482-1986 (Monday-Friday, 8:30-5:30 p.m. Washington, DC time.)

For more information on the FAS home page, contact Harold Kanarek, tel. (202) 720-0328; fax. (202) 720-1727; or via e-mail kanarekH@fas.usda.gov

The U.S. Department of Agriculture (USDA) prohibits discrimination in all its programs and activities on the basis of race, color, national origin, sex, religion, age, disability, political beliefs, sexual orientation, or marital or family status. (Not all prohibited bases apply to all programs.) Persons with disabilities who require alternative means for communication of program information (Braille, large print, audiotape, etc.) should contact USDA's TARGET Center at 202-720-2600 (voice and TDD).

To file a complaint of discrimination, write USDA, Director, Office of Civil Rights, Room 326-W, Whitten Building, 1400 Independence Avenue, SW, Washington, DC 20250-9410 or call (202) 720-5964 (voice and TDD). USDA is an equal opportunity provider and employer."